

IRS News Release

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New IRS Fax Guidelines Ease Burden on Taxpayers

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WASHINGTON — The Internal Revenue Service today announced new facsimile guidelines that will make it easier for taxpayers and tax professional to correspond with the agency. The new guidelines will expand the list of documents and information the IRS will accept via fax.

The expanded guidelines stem from recommendations from tax professional organizations. The changes are aimed at reducing the burden on taxpayers and practitioners and shortening the time it takes to resolve tax inquiries and cases. The new guidelines became effective Oct. 1, 2003.

These guidelines will save time and effort. The changes will mean taxpayers can resolve issues before the IRS more quickly. The IRS also thanks the National Society of Accountants and other tax professional groups who brought this issue forward. The agency is committed to considering any good idea that will ease the burden on taxpayers.

The new fax guidelines apply only to taxpayers and their representatives who are engaged in an on-going contact with the IRS, such as an examination or resolving questions about tax returns that are being processed. The fax can only take place after a discussion with the IRS employee who is requesting the information.

These general guidelines are applicable to all divisions and cover operations related to income tax, employment tax, excise tax, estate tax, gift tax, and generation skipping tax, as well as tax exempt and employee plans determinations. While the IRS has previously accepted forms via fax in limited situations (such as 1120-S elections and Powers-of-Attorney) the new guidelines permit an expanded number of forms and other types of documentation to be submitted by fax in the course of many return related inquiries.

The new guidelines are available on IRS.gov under "Tax Professional."